

Marketing & Outreach – Develop Resources

Description

Successful programs need consistent, high quality marketing and outreach materials and resources that promote the program benefits in a way that will resonate with customers. Once you [defined your target audiences](#) and [messaging](#) based on their motivations, you devised a [plan to create demand for your program](#) that will leverage your brand using a variety of strategies and tactics. Now you can develop marketing and outreach resources to reach your audiences.

The types of marketing and outreach resources that your program might use range from direct mail and advertising to one-stop-shop websites, social media content, videos, and infographics (visual representations of information or data intended to present complex information quickly and clearly). Resources can also include talking points, signage, banners, exhibits, and collateral materials that can be distributed by your marketing and outreach partners and staff at events.

Whatever materials you create, they should align with your program brand's personality, tone, messaging, and look-and-feel to reinforce program awareness and expand the impact of your materials to increase consumer demand.

To assist your resource development efforts, this section covers the following topics:

- Staff and plan to develop marketing & outreach resources
- Create a distribution plan
- Develop materials that motivate with a call to action
- Brand your outreach consistently
- Use traditional and modern materials
- Share your materials internally and with partners.

Marketing & Outreach

Stages:

[Overview](#)

1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. [Communicate Impacts](#)

Find related information across other program components:

- [Market Position & Business Model – Develop Resources](#)
Identify and develop needed resources to position your organization in the market and maintain a viable business model.
- [Program Design & Customer Experience – Develop Resources](#)
Develop the necessary materials, tools, and staff capacity to effectively deliver and manage your program.
- [Evaluation & Data Collection – Develop Resources](#)
Identify and implement systems and tools that will support data collection and data quality necessary for effective evaluation.
- [Financing – Develop Resources](#)
Develop the procurement, outreach, and loan support resources required to perform your financing activities.
- [Contractor Engagement & Workforce Development – Develop Resources](#)
Develop workforce and contractor engagement procedures, forms, and materials

Step-by-Step

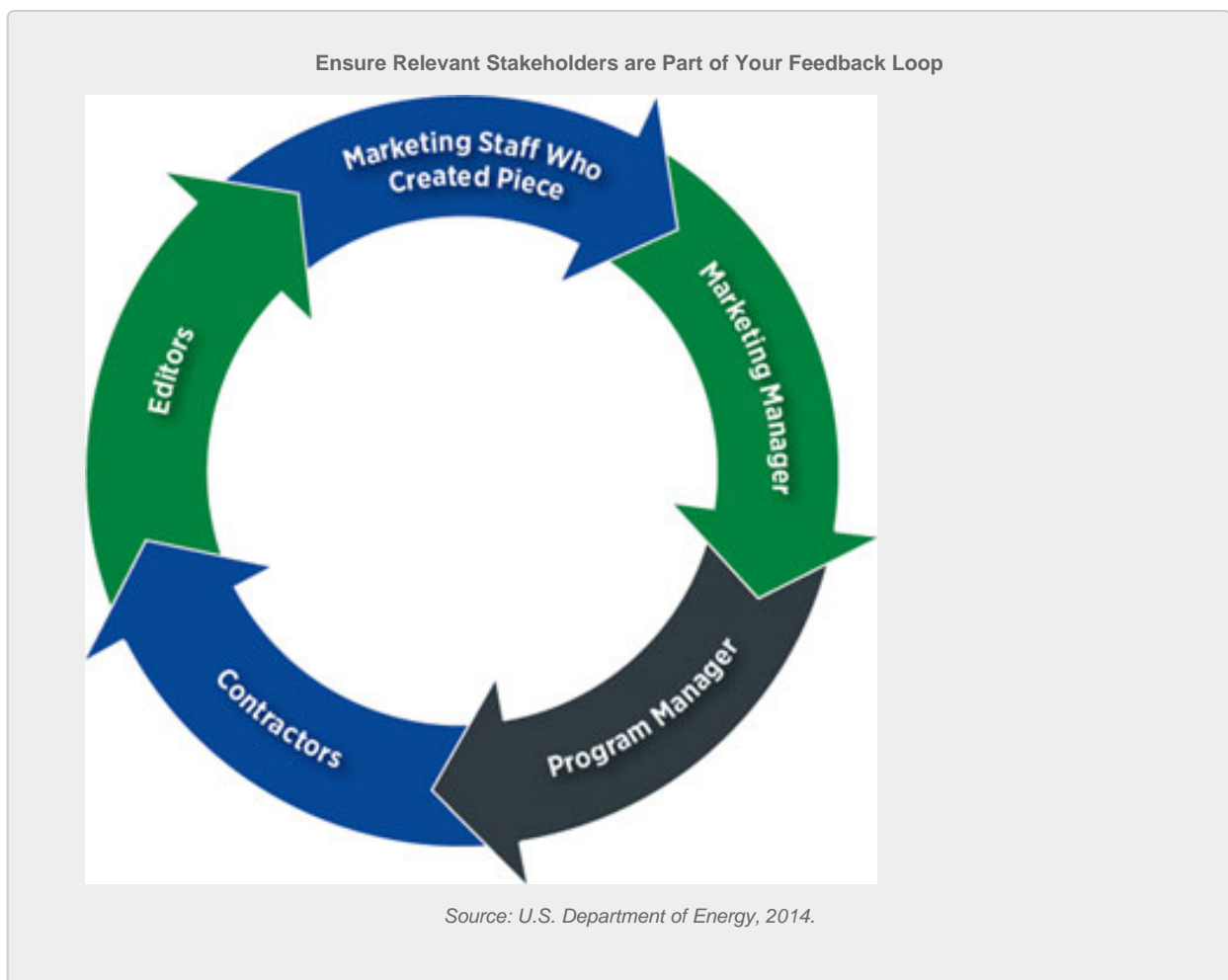
Using [research conducted](#) about target audiences, a [brand platform, and focused messaging](#), marketing and outreach materials can now be developed that you and [your partners](#) will use to execute your [marketing and outreach implementation plan](#).

The following steps will help guide the development of marketing and outreach resources for your program.

Staff and plan to develop marketing and outreach resources

When [developing implementation plans](#), you should have considered your marketing needs and taken steps necessary to build a solid, qualified marketing team made up of paid staff, volunteers, consultants, and others as needed.

Programs should expect to have, at a minimum, one dedicated professional to support the program's marketing and outreach efforts. This person will lead the marketing team—whether in-house or a qualified firm you choose—to draft, design, and deliver the marketing materials that will promote your program and its benefits in a way that will resonate with customers and consistently reflect the program's branding strategy.



Before you start creating new resources, have your marketing team develop and document a general process and timeline for developing materials.

- This can be in the form of a spreadsheet, chart, monthly calendar, or other platform that will be easy for all involved to understand deadlines associated with material development.
- It should include review time, print schedules, major events, advertising deadlines, mailing targets, and posting or distribution dates.

When developing your review process and schedule:

- Make sure to build in ample time for all necessary stakeholders to review and approve your materials before they are released.
- Always ask an editor to review the final materials before they are printed, posted, or distributed. Program materials need to look professional and be free of any typographical errors.

- Busy schedules, business travel, vacations, and unanticipated tasks (i.e., “fire drills”) can often make material review take longer than anticipated, so build in plenty of time for the review process.

Consult Contractors When Developing Resources

Contractors are the primary point of contact for homeowners during the home energy upgrade process. Take advantage of their expertise and resources by inviting contractors to contribute to your marketing and outreach material planning and development:

- Invite contractors to suggest marketing materials they think would be helpful to present to your program’s customers.
- Ask contractors if they have materials they would like to include your program logo or other identifier in to distribute to potential customers.
- Ask contractors if they are willing to cost-share material production. Some Home Performance with ENERGY STAR Sponsors split the cost for marketing materials with contractors, saving programs money and providing contractors with more visibility or legitimacy.

Learn more about engaging contractors as marketing and outreach partners in the [Marketing and Outreach Identify Partners](#) handbook.

Create a distribution plan

You and your marketing team can brainstorm a materials distribution plan based on target audiences, budget, and marketing and outreach strategies. The following are just a few suggestions for channels to get you started on a distribution plan, but there are many more marketing and outreach possibilities.

- Target Audience — Before developing any materials, you will want to determine which marketing channels are most likely to reach your target audience.
 - If this information was not gathered during the [market assessment](#), reach out to your [marketing and outreach partners](#) to determine if they have experience communicating with your target audience and know which outreach methods have proven most effective for reaching them.
 - For example, you should not spend time and money developing a newspaper advertisement if research suggests your target audience does not typically read the newspaper in hard copy. Some programs with specific offerings have found targeted radio or online advertising to be a successful alternative.
 - Tech-savvy audiences might be more responsive to scanning a Quick Response (QR) Code to visit your program’s website via smartphone or signing up to participate in your program on an electronic tablet at an event.
- Budget — Planning ahead for what marketing and outreach materials to develop with your current budget will help prevent overspending before your campaign ends.
 - Be cautious about overspending on the materials you produce first, such as advertisements, and not having sufficient funds to create follow up materials, such as customer surveys.
 - Printing, videos, and advertising costs can be expensive, depending on the outlet chosen, so aim to use these outlets sparingly if budget is a concern.
 - Because your website is likely supported and maintained by your program, using provocative marketing and outreach to drive potential customers there to read more detailed messages could be a cost-effective approach.
- Strategies — If your marketing and outreach strategies (see DD.5. Develop Implementation Plans) include connecting with customers at in person events, consider what you might need.
 - If you print several copies of a handout for distribution at multiple events, it might be helpful to keep an inventory so you do not run out of materials with no time to reprint.

- - - If you are using a handout for events, ask event organizers for an attendee estimate and print copies accordingly. You will also want to track the materials used and their effectiveness to determine what is most successful in motivating consumers to act, or not.
 - Equipping neighborhood canvassers with a branded nametag and information sheet can help validate their connection to the program, since consumers need to feel your program's representative is trustworthy and legitimate.
 - If you are holding open houses or promoting demonstration homes, you will want to develop promotional yard signs and informational posters to promote and display at the events.

Marketing and Outreach Material Must-Haves

Developing the following marketing and outreach materials at the start of your program could help build a solid foundation for your marketing and outreach efforts.

- **Program logo.** A logo that reflects your program's brand is essential to creating a consistent, recognizable look-and-feel for your marketing and outreach materials.
- **Brief program boilerplate.** This one-to-two sentence description of your program can appear on marketing and outreach materials and at the bottom of all press materials to briefly and consistently tell the purpose of your program and what it accomplishes.
- **Email or hard copy template.** Whether you communicate with your audience electronically or in hard copy, you will want a template that provides a consistent look-and-feel so recipients can make a connection with other program marketing and outreach materials they might have seen. Other program components (e.g., financing, contractor engagement) can also use these templates for their communications.
- **Website.** Visiting a program website is often a call to action on marketing and outreach materials. While your website will likely consist of more than marketing and outreach materials, having a website that reflects your brand and messaging and is easy to navigate is essential to ensure those you brought in with your marketing materials take enough time on the website to learn more about your program and take the next step.
- **Promotional flier.** A brief, one page handout of your program offerings is useful for distribution at meetings or other events. Keep the piece engaging by not including too much text, but be sure it relays your program's purpose, eligible participants, and call to action.

Other fundamental materials to consider, depending on your promotional outlets, include direct mail pieces, posters, infographics, videos, banners, exhibits, or presentation templates. These are just a few suggestions; your particular program's strategies will require development of other materials as well.

Gather input from all marketing and outreach and program staff and stakeholders to help determine which foundational materials are essential for your program.

Keep in mind that you will want to make sure these materials are working before committing too much time and money to them. A beautiful, glossy handout might be loved by your marketing and program staff, but if it does not resonate with your target audience, you should not keep using it.

Consider testing the effectiveness of your materials with focus groups or order smaller print runs that you can reorder or revisit based on results. You can also track which materials work best with customers by including a different promotional code on each material type or campaign and asking customers to refer to that code when they call.

The [Assess and Improve Processes handbook](#) provides guidance on how to monitor the effectiveness of your marketing and outreach materials.

Develop materials that motivate with a call to action

After understanding the audience you are trying to reach and the marketing and outreach channel to reach them, you are ready to use the messaging developed in the [Make Design Decisions stage](#) to develop marketing and outreach materials.

Following are some topics to consider covering in your materials:

- Various benefits of home energy upgrades (e.g., save money, it is easy to participate, or increase your home's comfort)
 - [ReEnergize Pittsburgh](#) highlighted several benefits of home energy upgrades on its website homepage.

Why ReEnergize?



Save Money

The less energy you use, the lower your monthly utility bill. That means money in your pocket and in the local economy!



Clean Air

Reducing your energy consumption, reduces our dependence on burning fossil fuels which pollute our air. Energy efficiency also means healthier indoor air!



Healthy Homes

Home energy upgrades can have positive health impacts that go beyond just comfort! Think improved indoor air quality and it's impact on asthma!



Happy Communities

Through our Ambassador Program we provide education and outreach materials for emerging leaders in energy efficiency that are then brought back into their community!

Source: ReEnergize Pittsburgh, 2014.

- How to participate in your program — keeping the message as simple and straightforward as possible
 - In Santa Barbara County, California, [emPowerSBC](#) used marketing materials to explain how customers can participate in the program by reaching out to a personal energy advisor.

Santa Barbara County Relies on Simple, Straightforward Messaging

Ask Jason

Have home energy questions?



emPowerSBC's Energy Coach
Jason Scheurer is a
free and trusted resource for
Santa Barbara County homeowners.

Jason is available to:

- Provide expert advice on home energy efficiency
- Conduct a site visit to evaluate your home and recommend solutions
- Help you take advantage of **emPowerSBC** incentives

If you are looking to make home energy upgrades, contact Jason today

Call or email Jason at (805) 568-3514 or
emPowerSBC@co.santa-barbara.ca.us

 **emPower**
Santa Barbara County 

Source: emPower SBC, 2014.

- Home energy upgrade services offered, using plain language that your customers will understand
 - [Efficiency Maine](#) showed customers the home energy upgrades it offered by posting a video.

[Video Helps Efficiency Maine Communicate With Customers](#)



WEATHERIZATION WEEK ON VINALHAVEN ISLAND

Learn about efforts to weatherize and air seal many of the homes in Vinalhaven using Efficiency Maine's air sealing incentive.

Source: Efficiency Maine, 2013.

- Financial and non-financial incentives that are available to your customers
 - [EnergySmart](#) in Eagle County, Colorado, promoted a low-cost home energy assessment and rebates on home energy upgrades ranging from \$200 to \$1,000 in its promotional materials, which were aimed at customers in their snow resort community.

Colorado Makes Incentives Clear

GET AIR
Under Energy Savings

Energy Smart Expert Rebate:

\$1000 REBATE*

Replace inefficient heating equipment with new, 92% efficient sealed combustion units. **or** Upgrade the efficiency of your home by 20% thru a combination of improvements.

Energy Smart Intermediate Rebate:

\$200 REBATE

Make energy efficient improvements such as air sealing and insulation, water heating, doors and windows.

Energy Smart Beginner Assessment:

\$50 ASSESSMENT

An Energy Smart home energy assessment. A \$400 value!

*Rebate Deadline Extended to 3/31/2012!

Call now to take advantage of energy saving rebate options!
970.925.9775

For More Information: Pitkin@EnergySmartColorado.com
www.EnergySmartColorado.com

EnergySmart

Source: EnergySmart Colorado, 2012.

Remember that all of your marketing materials should include a call to action (e.g., call a phone number, visit a website, snap a Quick Response (QR) Code) for the potential customer to answer on the way to getting a home energy upgrade.

- Without a call to action, your message could reach hundreds or even thousands of potential customers who might be interested in what your program offers but are not clear on the next step to get involved.
- It is important for the call to action to be easy for potential customers to answer. For example, if the call to action is to visit a website, the website's URL should be short, and the landing page should mirror the marketing piece's look-and-feel so potential customers know they are in the right place.

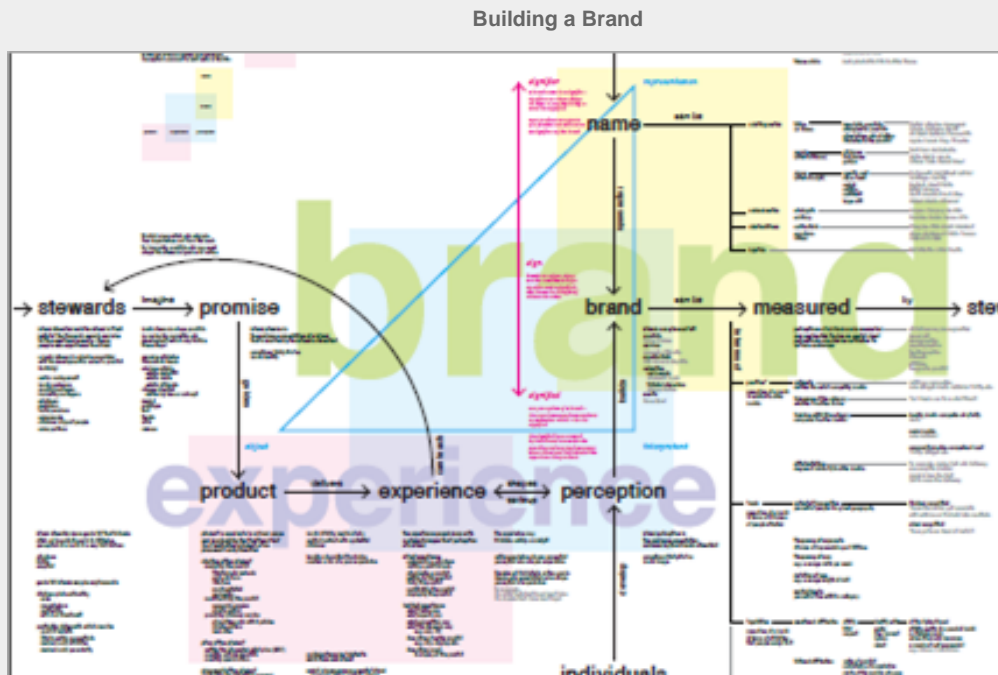
Any messaging used on your website should be consistent with the messaging that brought the customer to the site. Also, ensure that the website navigation and necessary steps are easy to follow, so the customer is able to quickly and easily complete their call to action.

Brand your outreach consistently

Whether you decided to create a completely new [program brand](#) or leverage an existing one that already has cachet in the marketplace, strive for brand and message consistency in all of your materials to avoid confusion about what your program is and what it offers.

A consistent brand helps maximize marketing resources by presenting clear messaging, images, and materials that convey your program benefits.

- A brand is not simply a logo on promotional materials. It is a way of presenting, promoting, and talking about your program, product, or concept.
- Brands manifest themselves in the language, photographs, and look-and-feel of all materials, promotions, advertising, and other techniques used to communicate program offerings to target audiences.
- To evoke a certain feeling, action, or behavior among target audiences, brand your program materials, whether they are meant for print or online distribution.



This [brand model](#), developed by the [Dubberly Design Office \(DDO\)](#), provides useful steps and tips for developing a new brand. DDO framed the model around four main ideas:

- A brand is more than a name or symbol
- Creating a great customer experience is the essence of good branding
- Perceptions of a brand can be measured
- Brands are a form of sign.

Source: [A Model of Brand](#), Dubberly Design Office, 2001.

Remember that not every program needs its own, new brand identity.

- Consider building on existing, recognizable brands such as [Home Performance with ENERGY STAR](#). Learn more about the ENERGY STAR brand in the [ENERGY STAR Brand Book](#) and read about the effectiveness of the brand in the [National Awareness of Energy for 2013 report](#).
- Some programs have found marketing success by co-branding materials with the recognized brand of their marketing and outreach partners.
- If a program has a limited timeframe built into its program plan, rather than one of long-term sustainability, it makes more sense to leverage existing resources, rather than spending precious time and money trying to build a brand not meant to last.

Regardless of the brand you choose, make sure you reinforce it by consistently using it in your materials since it often takes at least three "touches," or different methods of getting your message in front of customers, before a message gets through to its target audience.

One Touch is Not Enough

The majority of people need to be exposed to a product message at least three times (on separate occasions) to buy into it, according to the "three-times convincer" concept, which is the result of broader research on the subject summarized in an [article](#) on "effective frequency" published in the July/August 1997 issue of the *Journal of Advertising Research*.

Source: [What Does Effective Frequency Mean in 1997](#), article from the *Journal of Advertising Research*. John Philip Jones, Syracuse University. 1997.

Before developing new program materials, make sure all relevant staff, consultants, or vendors are well-versed in your program's branding guidelines. Guidelines should be based on the [branding platform you developed when making design decisions](#) and should include the following:

- The style, tone, and personality you want to convey through materials
- Specific terminology to use when referring to the program and its offerings
- Logo and other program marks
- Color palette, photographs, and graphic treatments
- Fonts and typographic treatments
- Appropriate use of the program's name, messages, facts, and statistics.

Keep in mind that your program brand should be reflected in all of the materials that your customer might come in contact with, not just marketing pieces.

- For example, if customers are asked to complete an [application form](#) to participate in your program, make sure the form look and feel follows your program brand.
- Additionally, if [contractors distribute materials](#) to the customer (e.g., surveys, informational pieces about what the home energy assessment or upgrade entailed) these pieces should also reflect your programs brand.
- To ensure compliance with your branding guidelines, you might request that all customer-facing materials from your program go through your marketing team for a brand compliance review before they are distributed.

Michigan Saves Builds Its Brand

[Michigan Saves](#), formerly BetterBuildings for Michigan, developed its [Brand Standards Tool Kit](#) so program staff could use a consistent look and feel, messages, and tone to promote the program. The toolkit includes information on proper logo usage, the program's color palette, and typography.

The toolkit enabled the program to consistently roll out a variety of materials to tens of thousands of homeowners living in 58 residential areas across the state.

Proper Logo Usage

Clear Space



Minimum Logo Size

To ensure the BetterBuildings for Michigan logo is highlighted and the message is still legible, a minimum logo size has been established. The minimum established size is only for printed material.



Color Palette

Primary Color Palette



PMS 2728	PMS 370
C 95	C 56
M 69	M 0
Y 0	Y 100
K 0	K 27
R 5	R 93
G 94	G 151
B 170	B 65
Hex 0055a4	Hex 5d9741

Preferred Color Usage: Whenever possible, it is preferred that PMS colors are used for printed material.

The Primary Color Palette must be used in all printed materials. The Secondary Color Palette is only to be used for accent colors. One or all secondary colors may be utilized in materials to add emphasis. These rules apply to BetterBuildings for Michigan branded materials. Regional Coordinator materials may use their individual branding palette.

Please see the Department of Energy Branding Guide for BetterBuildings for a list of secondary color options.

Source: Michigan Saves, [Brand Standards Tool Kit](#), 2010.

The Missouri Agricultural Energy Saving Team — A Revolutionary Opportunity (MAESTRO) Orchestrates a Consistent Brand



Source: The Missouri Agricultural Energy Saving Team — A Revolutionary Opportunity (MAESTRO), 2012.

Phoenix's Colorful Brand Adds Energy to Program Materials

Another Energy Efficient Building
made possible by



A BETTER BUILDINGS PROGRAM

www.energizephx.com

Saving Money by Saving Energy



Approved
Contractor

One Day Only
Saturday, March 24, 2012

"It's Easy with Energize Phoenix"

**Energize Phoenix is
Doubling Rebates.
Receive up to \$3,000 in
Energy Efficiency
Home Improvements!**

Energy Efficiency Fair and Contractor Exhibit
10 am to 2 pm, Saturday, March 24, 2012
Burton Barr Library (north parking lot)
1221 N. Central Avenue, Phoenix



Find out more.
Visit energizephx.com
or call 602-495-5275.

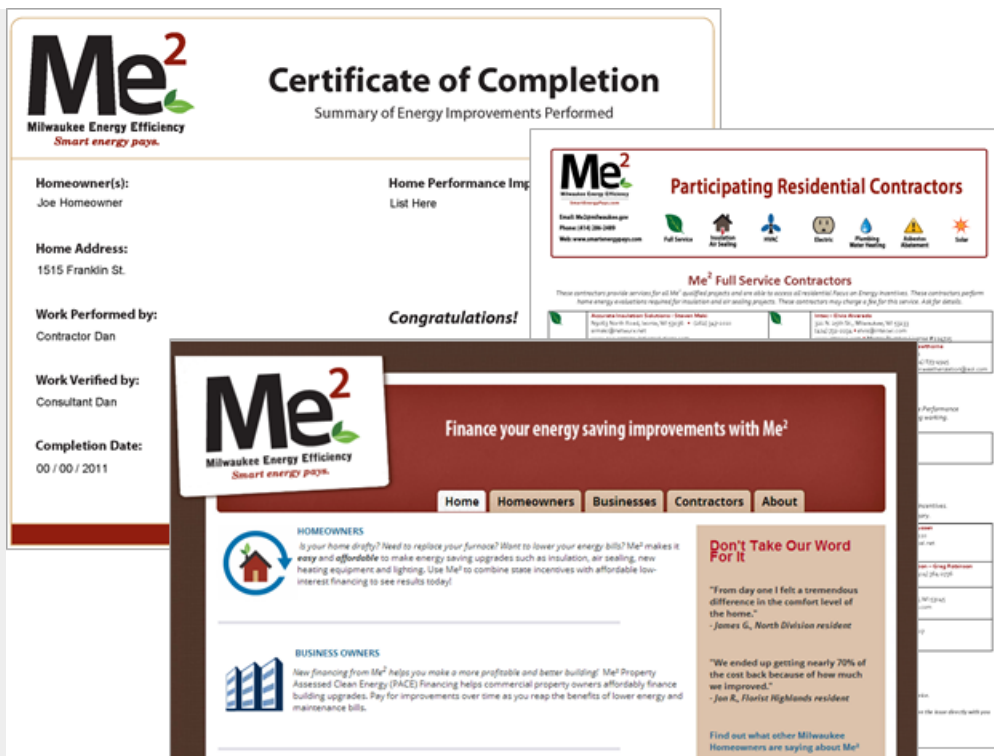
Save Money by Saving Energy!

Cash
Incentives
Available!



Source: Energize Phoenix, 2012.

Milwaukee Energy Efficiency (Me²) Uses Brand Consistency



Source: Milwaukee Energy Efficiency, 2011.

Use traditional and modern materials

When developing branded materials to help bring attention to your program, there is no secret formula for what works and what does not. As a rule of thumb, think about who your [target audiences are](#), what [messages](#) will resonate with them, and which [messengers](#) are best positioned to deliver those messages for you.

Consider both "tried and true" marketing techniques, as well as less traditional information dissemination channels. The following examples from Better Buildings Neighborhood Program partners demonstrate traditional and more modern materials used to motivate customers to undertake home energy upgrades.

You do not need to overcomplicate your materials with a lot of "bells and whistles." Sometimes the most effective marketing methods are as simple as an old-fashioned letter.

- For example, [Community Power Works \(CPW\) in Seattle, Washington](#), used traditional direct mail to reach a specific market segment homeowners with oil heating. Although CPW sent a glossy insert and other mailings, the piece that really worked to generate interest in the program was a simple letter that was branded with the City of Seattle's logo, which introduced residents to the program incentives in a clear and straightforward way. The city's logo had a credibility, trust, and familiarity, which a new program could not hope to have.

Seattle's Community Power Works Reaches Target Audience With Direct Mail



SEATTLE OFFICE OF
Sustainability & Environment



Dear [homeowner name]

Community Power Works, Seattle's home energy upgrade program, offers rebates up to **\$4,200** for homeowners with oil heating systems who want to increase the energy efficiency of their home. Community Power Works' rebates help homeowners do everything from upgrading to high efficiency heating systems to increasing insulation, sealing up air leaks, and installing new windows. Sign up today – incentives are limited. **Rebates include \$500 toward decommissioning your oil tank, available to the first 100 Community Power Works customers** who complete the work and submit the rebate form for payment.

Why upgrade your home?

- You can both save money and enjoy a more comfortable, healthy home.
- Heating oil is more expensive now than ever before, with costs around \$4.50 per gallon.
- You could pay \$2,000 or more to heat your home with oil next winter.
- Heating a Seattle home with oil produces more carbon emissions and air pollution than other heating systems.
- Upgrading from oil to an efficient gas furnace or electric heat pump may lower your annual heating costs by 50-65% or more.

Seattle homeowners have reduced their energy use by over 30% on average through Community Power Works. Customers report that their homes are less drafty and more comfortable than before.

What does Community Power Works offer?

In addition to energy efficiency rebates, Community Power Works provides one-stop shop solutions exclusively for Seattle residents, including:

- A deeply-discounted energy assessment (cost \$95, value \$400) made possible by Seattle City Light.
- A City of Seattle approved contractor to develop a bid and, if accepted, do the work.
- Affordable loans with easy terms to qualify that can be paid back on your Seattle City Light bill.
- Ongoing customer service and energy expert support, as well as quality-assurance to ensure that the job is done right.

Sign up today!

Start your upgrade process by signing up for a \$95 energy assessment.
Visit www.CommunityPowerWorks.org, or give us a call at 206-449-1170.

Sincerely,

Jill Simmons
Director, City of Seattle Office of Sustainability & Environment



Source: [CPU Letter](#), Community Power Works, 2012.

Yard signs like the ones political candidates have used for years can help pique the interest of neighbors who want to save money and energy in their homes, or just know what is happening down the street. For example:

- The [California Center for Sustainable Energy](#) used signs to promote [demonstration home tours](#) where homeowners could view installed energy efficiency upgrades and talk with the contractor who completed the upgrades.
- Residents who upgraded their homes through [Nashville Energy Works](#) used yard signs to encourage others to go green and save energy.
- In [University Park, Maryland](#), homeowners that participated in the STEP-UP program received a yard sign with two possible boxes that could be checked: one for a home energy assessment, one for an installed upgrade. Once the home assessment was completed, homeowners received a yard sign with the first box checked. When the home energy upgrade was completed, they received a sign with both items checked.

Yard Signs Give Neighbors Something to Talk About



Source: Small Town Energy Program, University Park, 2012.

Some programs have been successful at bringing home energy upgrade benefits to life by sharing the experiences of satisfied customers.

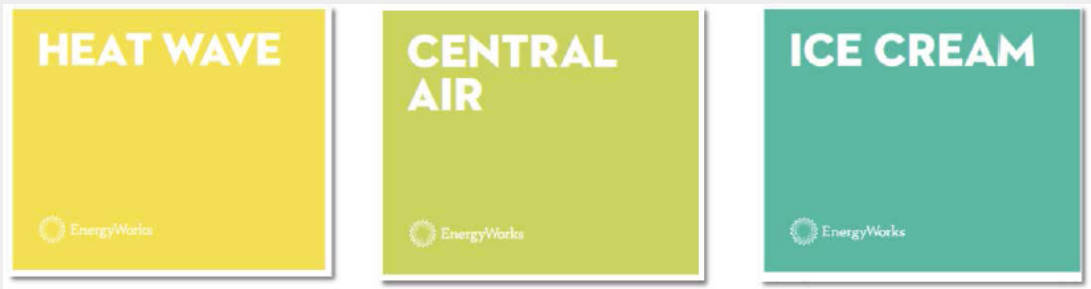
- A "Case Studies" page on the [Michigan Saves](#) website allowed customers to boast about their upgrade experience.
- The [Local Energy Alliance Program](#) (LEAP) in Charlottesville, Virginia, created profiles on the success stories of many of its customers.

Homeowner Testimonials Share Real Benefits of Home Energy Upgrades

Advertising materials that tap into what is at the forefront of many peoples' minds during various times of year, such as cold winter weather, holidays, and summer vacations, can help attract program participation.

- The [EnergyWorks program](#) in Philadelphia focused an [advertising campaign](#) on the weather. On hot days, for example, an animated banner on weather-related websites enticed visitors to click over to the EnergyWorks website with words such as "ice cream" and "central air." During this campaign, the EnergyWorks website accrued 15,000 visits, which helped double traffic to the program website and ultimately helped quadruple the number of home energy assessments completed.
- View the presentations, "[Leveraging Seasonal Opportunities for Marketing Energy Efficiency](#)" and "[Leveraging Holidays and Other Events](#)," for more program examples of how to appeal to audiences using timely, themed messages.

EnergyWorks Phased Marketing Campaign

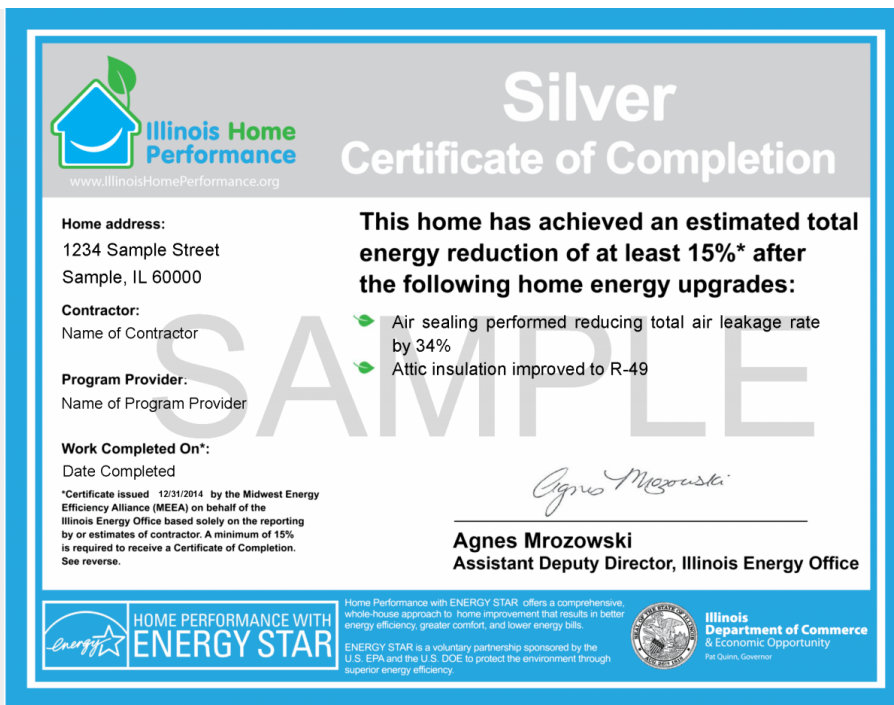


Source: [Energy Efficiency Residential Marketing Keep it Simple. Keep it Focused](#), EnergyWorks, 2012.

An opportunity for recognition entices some homeowners to complete home energy upgrades.

- [Illinois Home Performance](#), a Home Performance with ENERGY STAR Sponsor, gave certificates to homeowners once they completed an upgrade. The program also encouraged homeowners to talk to their real estate professional about the home energy upgrade and ask them to attach a digital copy of the certificate to the home's listing on the Multiple Listing Service.
- [Energize New York](#) provided a different color medallion to homeowners who completed upgrades based on the level of energy savings achieved (0-10%, 11-20%, 21-30%, 31-40%).
- [Milwaukee Energy Efficiency](#) developed a certificate that congratulated homeowners and included information about the work that was performed.

Certificates Give Homeowners Recognition and Real Estate Edge



Source: Silver Certificate of Completion, Illinois Home Performance, 2013.

Find more examples of advertising that leveraged common themes consumers may be thinking about in the Program Materials section in this handbook's [Examples tab](#).

Programs have used the latest information technology to create demand for upgrades.

- In Charlottesville, Virginia, the [Local Energy Alliance Program](#) (LEAP) used electronic tablets and online tools that show homeowners how their typical energy use compares to their neighbors to make the case for upgrades.

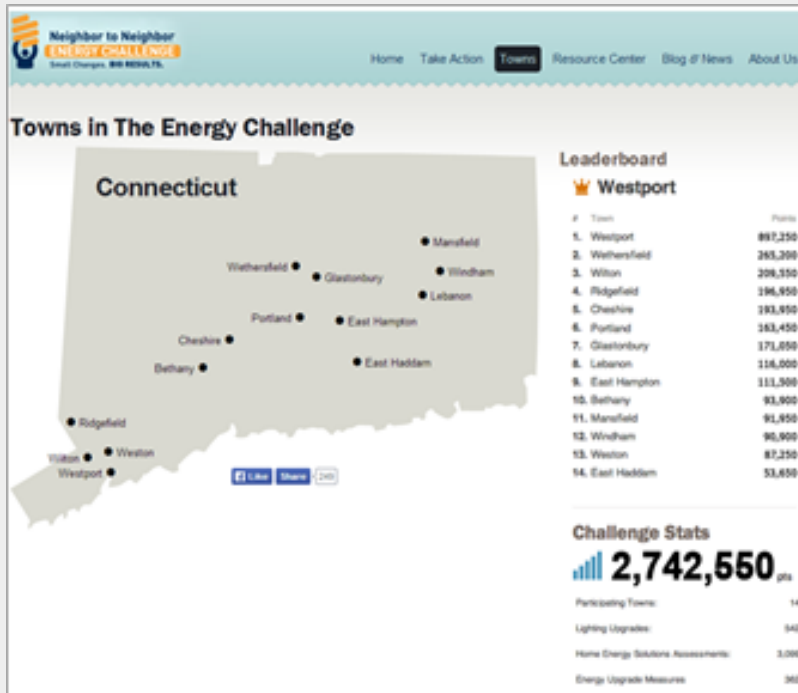
Electronic Tablets Put Energy Use Information at Tip of Homeowners' Fingers



Source: Local Energy Alliance Program website, 2014.

- The [Neighbor to Neighbor Energy Challenge](#) used an online leader board to track communities' progress toward reducing home energy use. The Neighbor to Neighbor Energy Challenge engaged residents in 14 Connecticut towns to reduce their home's energy use by 20%. As residents joined and took actions to help their household, they earned points that were redeemed for community energy projects. The Neighbor to Neighbor Energy Challenge website tracked these points via the online leader board, bolstering the competition among the participating communities, where everybody won, but some more than others.

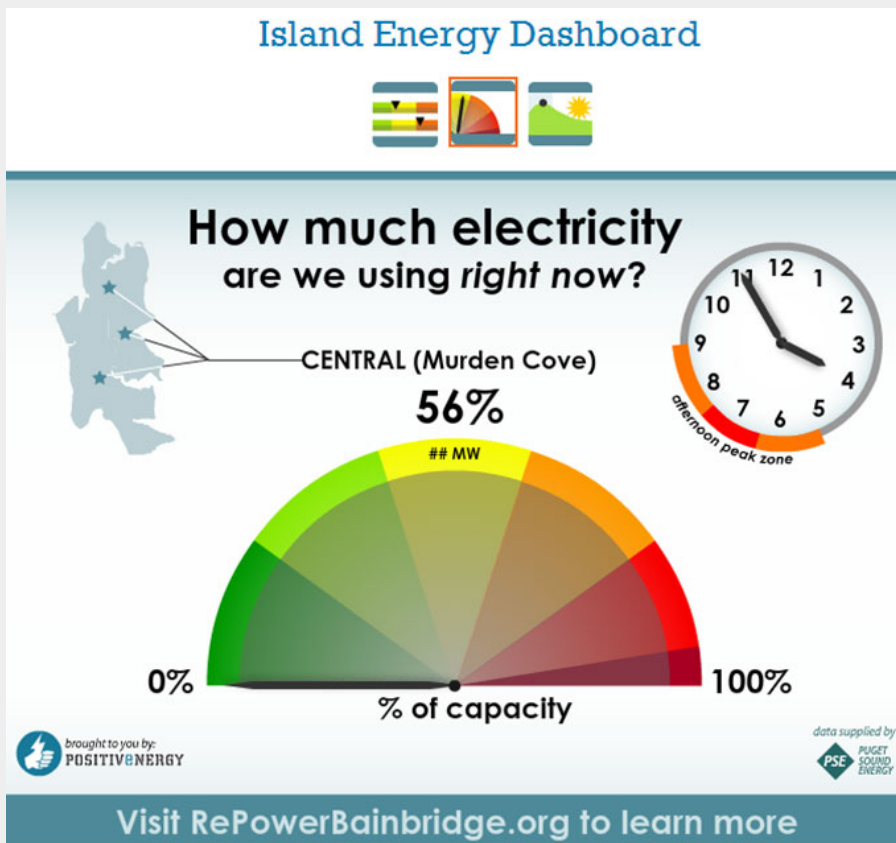
Leaderboard Tracks Connecticut Community Competition Progress



Source: Neighbor to Neighbor Energy Challenge website, 2011.

- To reach residents where they gather and help them understand the impact of their energy use, RePower Bainbridge in Washington developed innovative Island Energy Dashboards that displayed real-time energy use at kiosks, in local businesses, on the island's commuter ferry, and online.

RePower Bainbridge Dashboards Help Energy Use Sink in for Residents



When aligned with other marketing and outreach efforts, social media can be a useful tool in building awareness among home energy upgrade customers. Programs have used social media to spread their messages through trusted sources such as neighbors. For example, [Efficiency Maine](#) used Twitter to promote its home energy efficiency calculator: “How efficient is your home? Calculate your home’s energy efficiency with Efficiency Maine’s handy online tool: <http://ow.ly/Jxofo>.”

For more information about using social media in residential energy efficiency outreach, see the Better Buildings Residential Network’s [Social Media Toolkit](#).

If your target audience includes a non-English-speaking segment, translating materials into another language will make your message more engaging. Be mindful, however, of the language used (there are many different Spanish dialects, for example) and use a native speaker to translate or proof your translated materials.

- To address its significant Hispanic population, [Energize Phoenix](#) not only created Spanish-language materials but also changed the messaging and the materials themselves to appeal to this demographic.
- [Energy Upgrade California's website](#) can be viewed in multiple languages, including English, Spanish, and Vietnamese, to appeal to its diverse population.

Energy Upgrade California Appeals to Diverse Audience



Source: Energy Upgrade California website, 2014.

Better Buildings Neighborhood Program Partners Show Off Marketing Materials

At the Better Buildings Neighborhood Program Business of Energy Efficiency Workshop in 2011, Better Buildings Neighborhood Program partners brought samples of their marketing materials. This image features some of these materials.



Source: U.S. Department of Energy, 2011.

Do Not Let Pay Per Click Web Ads Subtract From Your Marketing Efforts

Pay per click advertising can be a cost-effective approach to using your marketing dollars. You can purchase advertisement space on search engines like Google, Bing, or Yahoo, and your ad appears when users search related terms. If users click on your ad, you pay. If users do not click your ad, you do not pay. If these advertisements are not managed properly, however, your ad can be clicked by mistake or by a user who will not end up being a customer. To ensure that your marketing dollars are well spent if you decide to purchase pay per click advertising, read about the [seven common mistakes pay per click advertising purchasers make and ways to avoid them](#) as presented in an article by Peter Troast of Energy Circle Pro in The Building Performance Institute's *Performance Matters* newsletter.

As you develop your materials, keep in mind that one touch is not enough. Consider multiple ways to reach your potential customers to increase the chances that customers will internalize the messages in your materials and take your call to action. (See the [Tip for Success, Follow Through With Customers](#), for more information).

- Multiple touches could come from following up with multiple direct mailings; making phone calls or sending personalized letters; promoting through television, radio, or online advertisements; in-person events and outreach; or new and creative approaches that will reach your target audience.

Share your materials internally and with partners

When your marketing materials are final, your marketing staff can be eager to get them out on the street. Before releasing any of your materials, however, it is important to make sure relevant program staff are familiar with the materials, messaging, and program goals that are about to be shared with the public.

All program staff and stakeholders that may come in contact with potential customers (e.g., customer service representatives, contractors, program representatives who attend public events) should be introduced to the marketing materials, messaging, and program goals so they can respond appropriately to inquiries and leads related to the materials.

Holding a briefing, meeting, or training with relevant staff will be crucial to introduce the marketing materials and field any questions staff have related to the messaging on the materials (i.e., benefits, incentives) or how and when to use the materials.

It is much better to raise and answer questions in a briefing, meeting, or training for the first time, rather than have your program's representatives in the field appear unknowledgeable or unprepared.

Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

Language matters – use words that resonate with your target audience

Words have power, so many programs decided to use language with positive associations. For example, the Better Buildings Neighborhood Program encouraged use of the term "assessment" instead of "audit" to avoid the negative connotation of a tax audit. "Home energy upgrade" sounds more positive than "retrofit," a term that might not be clear to the average consumer or may imply something old that underwent makeshift improvements in order to work.

Programs found it was important to create messages and materials that resonated with homeowners. Messages were more likely to be well received if the messenger sounded and looked like the target audience. Vivid examples (e.g., "home performance professionals are mechanics for your home") and statements of avoided loss rather than gain (e.g., "until you get the flue fixed, your hard-earned cash is flying right up that chimney") worked better to inspire potential customers to participate. A comprehensive [evaluation](#) of more than 140 programs across the United States found that successful programs were more likely than others to promote upgrades on the basis of increased comfort.

- [Michigan Saves](#) program staff who spoke directly to residents while canvassing homes during neighborhood "sweeps" initially found little success convincing homeowners to sign up for the program. The problem was that their messages were framed around energy savings and environmental benefits, and they used energy efficiency jargon, such as "reducing leakage" in the home. Once the program reframed its messages around comfort and lower heating bills, canvassers felt better received by the homeowners; they also talked about specific neighbors down the block who were feeling fewer drafts since their participation in the program.
- Philadelphia's [EnergyWorks](#) married comfort with value in their online advertising's weather-focused messaging, which included phrases like "Lower utility bills, warmer cocoa breaks." From October 15 through December 15, 2011, when these advertisements ran, the program received 9,350 website visitors, 77% of who were reported as new visitors.

Communicate with audiences at least three times; once is not enough

All residential energy efficiency programs have found that outreach needs to be repeated to connect with and remind potential participants about program offerings. As marketing gurus note, the majority of people need to be exposed to a product message at least three times (on separate occasions) to buy into it. The more time between communications, or "touches," the less likely the customer will take action. Some programs even coordinated marketing strategies with partners, so that potential customers get multiple, complementary touches from different communication channels or groups.

- [NOLA WISE](#) (New Orleans, Louisiana, Worthwhile Investments Save Energy) used a combination of traditional paid media, grassroots outreach, and earned media outlets to communicate with its audience. The program generated the highest number of high-quality leads through its homeowner showcases, which were events held at the home of a resident who completed upgrades. The NOLA Wise team and contractors were on hand to highlight the completed home energy upgrades and educate attendees on how to make their own homes more comfortable and energy efficient. NOLA WISE's homeowner showcases were promoted through neighborhood canvassing, electronic newsletters, social media, collaboration with nearby neighborhood associations, and earned media strategies.
- Philadelphia's [EnergyWorks](#) promoted its program through a multi-phased advertisement plan. This first phase focused on radio and weather-related websites to take advantage of peoples' moods during specific weather conditions, which resulted in 15,000 visits to the EnergyWorks website and 303 completed home energy assessments. The second phase used print, online, and regional rail marketing materials to create a sense of urgency to compel consumers to act on their immediate needs by introducing the benefits of energy efficiency. In its third phase, EnergyWorks' advertising continued to emphasize the value and comfort of energy efficiency upgrades, and introduced an educational component that defined some common home energy upgrade terms, such as insulation and air sealing, in ways customers could understand.

EnergyWorks Aligns Advertisements With Weather

These EnergyWorks online banner ads rotated on accuweather.com during days with anticipated temperatures of 85 degrees or above.

Follow through with customers

Following up on leads that result from your marketing and outreach efforts quickly and consistently will help your program convert them from interested parties to satisfied customers. Many programs found a sizable drop-off in action if they or their contractors were not able to follow up within a few days to a week. Additionally, contacting initially interested participants regularly (e.g., through a monthly email, with a phone call every few months) was also a successful strategy for turning potential customers into paying customers.

- [BetterBuildings for Michigan](#) saw more homeowners undertake upgrades in cities where it held a neighborhood sweep and followed the sweep with a city-wide offering a year later. While the program initially planned for a timeframe of four to six weeks for homeowners to decide whether or not to undertake a home energy upgrade, following up with customers after giving them time to better understand the program's offer helped BetterBuildings for Michigan achieve success. Based on the success of the initial follow-up offers, BetterBuildings for Michigan lengthened the time for each sweep to a full year. Overall, the program was able to complete nearly 8,000 home energy assessments and more than 6,300 home energy upgrades.

One successful approach programs used to maintain this connection was through energy advisors who followed up with homeowners after their initial interest and coached them through the home energy upgrade process.

- The [Greater Cincinnati Energy Alliance](#) (GCEA) realized that many of the homeowners who signed up to learn more about the program were getting stuck between creating their online profile to initiate program participation and completing a home energy assessment, and then between the energy assessment and home energy upgrade stages. Instead of accepting these customers as losses, GCEA had its full-time energy advisor make phone calls to each of these customers to learn why they were not completing their home energy assessments or upgrades and to explain to customers how to move on to the next stage. By explaining the entire upgrade process to individuals, GCEA was able to ensure that potential customers did not drop out of the program simply because their questions were not answered, they did not understand how the program worked, or they forgot that they signed up in the first place. Of the customers the energy advisor contacted, 50% who completed assessments followed through to complete home energy upgrades.
- The [Denver Energy Challenge](#) provided customers with [free energy advisors](#) who recommended energy improvements and guided participants through the process. The program found that those advisors with a background in customer service had a better conversion rate than those whose expertise focused on building science. Overall, three out of every four customers who worked with an energy advisor went on to complete a home energy upgrade. Although not all participants made all of the improvements recommended at once, because Denver's energy advisors kept in touch with participants, program staff reported that many homeowners completed additional upgrades later on in the process.
- Connecticut's [Neighbor to Neighbor Energy Challenge](#) used energy advisors and a customer management database to help ensure that their contractors were following up on leads and following through with customers in a timely manner. Through weekly meetings with contractors and daily monitoring of contractor activities, the program's energy advisors made sure contractors were leading potential customers through the program's next steps. The program set up its database to send automatic reminders to contractors when they needed to take a new step with the homeowner. This regular follow-up helped ensure that homeowners heard back from contractors within a certain number of days, depending on where they were in the process.
- [Michigan Saves](#), formerly BetterBuildings for Michigan, saw more homeowners undertake upgrades in cities where it held a neighborhood sweep and followed the sweep with a city-wide offering a year later. While the program initially planned for a timeframe of four to six weeks for homeowners to decide whether or not to undertake a home energy upgrade, following up with customers after giving them time to better understand the program's offer helped Michigan Saves achieve success. Based on the success of the initial follow-up offers, Michigan Saves lengthened the time for each sweep to a full year. Overall, the program was able to complete nearly 8,000 home energy assessments and more than 6,300 home energy upgrades.

Make upgrade benefits visible by showcasing completed projects and actual results

Unlike remodeling projects, home energy upgrade benefits are generally not immediately visible to the casual observer. Strategies that demonstrate tangible benefits from upgrades can help increase understanding and motivation with potential customers. To help energy efficiency become real, some programs successfully used house parties and demonstration homes to show potential customers what a home energy assessment or upgrade entails. In some cases, the hosts of these events were interested or satisfied customers who invited friends and neighbors, allowing the program to leverage word-of-mouth marketing from trusted sources. Program staff and a contractor were typically present to walk the attendees through a home energy assessment of the house or, when showing an upgraded home, point out the home performance measures that were installed.

California Puts Homes on Display



Source: California Center for Sustainable Energy

In Their Own Words: Engaging Neighbors Through Home Energy Showcases



Source: U.S. Department of Energy, 2012.

- During a one-year "house party" initiative, [Energy Impact Illinois](#) worked with trusted neighborhood champions to host more than 650 house parties, which enabled more than 3,000 Chicago homeowners, neighbors, and friends to see for themselves what energy efficiency upgrades can mean to a home. Each gathering included a real-time energy assessment demonstration on the homeowner's home, and the opportunity for attendees to sign up for their own assessment or upgrade. Program administrators estimated that more than 900 house party participants completed upgrades. Learn more in the [Focus Series interview with Energy Impact Illinois](#).
- The [California Center for Sustainable Energy](#), which manages a residential energy efficiency program in San Diego, partnered with municipalities to conduct [demonstration home tours](#), which successfully promoted both energy assessments and the contractors who performed them. During the tours, neighbors heard testimonials from demonstration homeowners, took a firsthand look at contractors' work, asked questions of the contractors who installed the upgrades, learned about available incentives, and had an opportunity to sign up for an energy assessment of their own home. Between January 28 (when the initiative formally launched) and April 21, 2012, about 25% of the home tour participants signed up for a home energy assessment with a contractor.

- **NOLA WISE** (New Orleans, Louisiana, Worthwhile Investments Save Energy) generated its highest number of high-quality leads through its Homeowner Showcases. NOLA WISE organized and promoted the open house events, which were hosted by homeowners who completed home energy upgrades. The NOLA Wise team and contractors were present to highlight the completed home energy upgrades and educate attendees on how to make their own homes more comfortable and energy efficient. The program saw an uptick in home energy assessment requests in neighborhoods where these events were held.

Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

Case Studies

None available at this time.

Program Presentations & Reports

None available at this time.

Program Materials

[EnergyWorks Grabs Attention in Calm and Stormy Weather with Intuitive Ads](#)

Author: U.S. Department of Energy

EnergyWorks' phased marketing campaign appeals to Philadelphia homeowners based on the current weather conditions.

[Request for Proposal for Branding and Communications](#) (488 KB)

Author: Southeast Energy Efficiency Alliance

Publication Date: 2010

This request for proposal from the Southeast Energy Efficiency Alliance is for branding and communications support.

[Brand Standards Tool Kit](#) (2 MB)

Author: BetterBuildings for Michigan

Publication Date: 2010

This branding guide was developed for BetterBuildings for Michigan staff so they can consistently use the program's look and feel, messages, and tone in marketing and outreach materials.

Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

[Example Survey for Successful Participants](#) (144 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Sample email survey template for successful program participants.

[Example Phone Survey for Screened-out Applicants](#) (211 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Sample phone survey for applicants who have been screened out from participating in the program.

[How to Write a Press Release](#) (154 KB)

Author: U.S. Department of Energy

This instructional template offers instructions on how to write a press release.

Tools & Calculators

[My ENERGY STAR Tutorial](#)

Author: ENERGY STAR

Publication Date: 2011

This document provides a tutorial of MY ENERGY STAR Account (MESA). MESA is a Web portal that houses program marks for ENERGY STAR Sponsors and contractors as well as various marketing pieces.

[Better Buildings Residential Network Social Media Toolkit](#)

Author: U.S. Department of Energy

Publication Date: 2015

The Better Buildings Residential Network Social Media toolkit can be used to help residential energy efficiency programs learn to engage potential customers through social media. Social media can build brand awareness concerning home energy upgrades and the entities working on them, which can lead to more energy upgrade projects taking place in the long run. This toolkit will help program managers and their staff with decisions like what social media works best for various program needs. When aligned with other marketing and outreach efforts, social media can be a useful tool in attracting home energy upgrade customers. Note that social media changes constantly, so users of this toolkit need to regularly reassess their methods and review results to ensure goals are being met.

Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#) for materials from and about individual programs.

Topical Presentations

[Better Buildings Program: Brands & Websites](#) (4 MB)

Author: U.S. Department of Energy

Publication Date: 2011

This presentation includes the brands, website addresses, and images for most of the Better Buildings Neighborhood Program partners.

Publications

[Marketing & Outreach for Home Energy Improvements](#)

Author: Lawrence Berkeley National Laboratory

Publication Date: 2010

This guide provides an assessment of various approaches to Marketing & Outreach for home energy efficiency improvements.

[A Model of Brand](#)

Author: Dubberly Design Office

Publication Date: 2001

This brand model, developed by the Dubberly Design Office, provides useful steps and tips for developing a new brand. Download the document for a better view. Note that the document is poster size, so zoom in for clarity.

[The ENERGY STAR Brand Book](#)

Author: ENERGY STAR

Publication Date: 2013

The Brand Book describes the implementation of the ENERGY STAR® logo for ENERGY STAR partners that are labeling a product, new home, or building that has earned the ENERGY STAR. The Brand Book also provides information about designing a new outreach campaign and using the ENERGY STAR® logo to communicating the program's commitment to energy efficiency.

[National Awareness of ENERGY STAR® for 2013](#)

Author: U.S. Environmental Protection Agency

Publication Date: 2013

This report provides the results of the Consortium for Energy Efficiency-sponsored 2013 ENERGY STAR Household Survey, which collects national data on consumer recognition, understanding, and purchasing influence of the ENERGY STAR label, as well as data on messaging and product purchases.

[Effective Practices for Implementing Local Climate and Energy Programs Tip Sheets](#)

Author: U.S. Environmental Protection Agency

Publication Date: 2015

This series of 19 tip sheets is based on the experience and expertise of EPA's Climate Showcase Communities. The tip sheets cover a wide range of topics, such as marketing and communications (effective messaging, traditional media strategies, community-based social marketing, and testimonial videos) and working with specific types of stakeholders (institutional partners, contractors, experts, utilities, early adopters, volunteers).

Webcasts

[How to Work with the Media](#)

[Presentation](#) (3 MB), [Media](#), [Transcript](#)

Author: U.S. Department of Energy

Publication Date: 2011

This webcast offers a preview of tools and proven techniques to work with local media to increase program visibility. The webcast also features a discussion where participants shared what is working with their program's media efforts.

